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Minister of Trade and Commerce

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## DOMINION BUREAU OF STATISTICS - CANADA

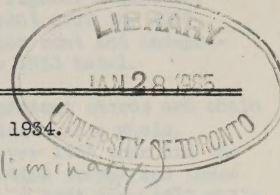
Dominion Statistician: R. H. Coats, LL.D., F.R.S.C., F.S.S. (Hon.)

Internal Trade Branch  
Chief: H. Marshall, B.A., F.S.S.

## CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS, 1934.

FOOD CHAINS IN CANADA, 1934.

(preliminary)



According to this preliminary report for the Census of Merchandising and Service Establishments, there were 84 food chains operating in Canada during 1934. These chain companies operated 2,381 stores and had total net sales during the year of \$4,614,500. In 1933 there were 91 food chain companies with 2,398 stores and total sales of \$103,382,900. Thus, while there were 7 less chain companies in 1934 than in 1933, the total number of chain units remained relatively constant while the value of chain sales increased over the 1933 figure by 1.19 per cent.

Comparative chain data are given in this bulletin for each of the years from 1930 to 1934. Representing the value of food chain sales in 1930 by 100, the relative sales for the four succeeding years may be represented by 96.85 for 1931; 85.94 for 1932; 103.03 for 1933; and 82.00 for 1934.

The food chains covered in this report are grocery chains, combination store chains (those selling both groceries and meats), and meat market chains. It should be remembered that variations in chain sales from year to year, as shown in this report, are not due entirely to the variations in sales of the individual stores. The volume of business transacted by chains from year to year is also affected by the entrance of new chains into the field either through the expansion of single or multiple stores into chains or the formation of new companies, and by the disappearance of chain organizations through ceasing to do business or retaining less than the four units necessary to be classified as chains.

It should be noted that the figures given in this report and shown in the following tables refer to corporate chains only. The figures for voluntary chains will be published later when all returns have been received.


When classified geographically it is found that the greatest increase in food chain business in 1934 over that in the preceding year took place in Alberta. In that province there were 10 chain companies in 1934, and these operated 128 stores with sales of \$4,793,800 or an increase of 6.08 per cent over the figure reported for 1933. On the other hand, food chains in Quebec experienced a decrease in business of 4.49 per cent below the 1933 level. The various provinces or divisions in order of increases in chain sales in 1934 over 1933 together with the percentage changes between the two years are as follows: Alberta, +6.08 per cent; British Columbia, +5.33 per cent; Manitoba, +4.25 per cent; Ontario, +2.01 per cent; Maritime Provinces, +.78 per cent; Saskatchewan, -.21 per cent; and Quebec, -4.49 per cent.

Of the 84 food chains operating in 1934, 39 have been classified as grocery chains, 33 as combination store chains and 12 as meat market chains. In many cases, organizations classified as combination chains operate a number of purely grocery units but firms have been classified as combination chains only if a substantial proportion of their total business is transacted in stores of the combination type. Due to the development of units of the straight grocery type into combination stores selling both groceries and meats, firms classified as grocery chains in one year may be classified as combination chains in another. This factor must be kept in mind in interpreting the business trends in each of the three types of chains.

During 1934 the 39 grocery chains operated 792 stores and had total sales of \$3,154,500. This represents an increase of 5.44 per cent over the sales of the 46 grocery chains with 821 stores which were operating in 1933.

There were 33 combination store chains in 1934 and these operated 1,433 stores with sales of \$61,422,100 or a decrease of .08 per cent below the amount of business transacted by 29 chains with 1,400 stores which were operating in 1933.





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Twelve meat market chains operated a total of 156 stores in 1934 with total sales of \$4,037,900. This amount was 15.46 per cent below the 1933 sales of 16 meat market chains which operated 177 stores in that year.

A preliminary report has already been published comparing the volumes of business in 1933 and 1934 of independent stores. According to the figures available, sales of independent grocery stores increased in 1934 by 3.05 per cent over the 1933 figure; sales of independent combination stores increased by 6.86 per cent and independent meat markets registered an increase of 10.99 per cent over the 1933 total.

While an exact comparison between the sales of independent stores and chain stores cannot be made at present, it would appear that for the Dominion as a whole, grocery chains experienced a greater increase in business in 1934 over 1933 than did the independent grocery stores. On the other hand, independent combination stores and independent meat markets registered considerable increases in business in 1934 over 1933 while the chains in these two fields registered decreases in sales volume.

#### FORMS OF TABLES--

Table I gives a summary of the principal statistics of all food chains combined, (grocery, combination store and meat markets), from 1930 to 1934. For each year, the table gives the number of chains, number of stores (both the maximum number and average as derived from the numbers reported as at beginning, middle and end of the year), amount of sales, percentage of 1930 sales figure and the percentage change in sales from the preceding year.

Table II presents figures by geographic divisions or provinces for 1930, 1933 and 1934. The number of chains, maximum number of stores operated and amount of sales for each of the three years are shown. In order to avoid disclosing individual operations, it has been necessary to combine the figures for the three Maritime Provinces.

Tables III, IV and V give summaries from 1930 to 1934 of the business transacted by grocery chains, combination chains and meat market chains respectively.





FOOD CHAINS IN CANADA, 1930-1934

TABLE I. NUMBER OF CHAINS, STORES AND TOTAL SALES, BY YEARS, 1930-1934

(Grocery, Combination and Meat Market Chains Combined)

	1930	1931	1932	1933	1934
Number of Chains .....	87	90	90	91	84
Number of Stores -					
Maximum .....	2,352	2,410	2,436	2,398	2,381
Average .....	2,218	2,310	2,347	2,301	2,299
Total Sales .....	\$127,582,500	123,568,000	109,639,100	103,382,900	104,614,500
Main Sales Index, (1930=100) .....	100.00	96.85	85.94	81.03	82.00
Percentage change in Sales from preceding Year .....	-	-3.15	-11.27	-5.71	+1.19

TABLE II. NUMBER OF FOOD CHAINS, STORES AND SALES BY PROVINCES,  
1930, 1933 AND 1934 COMPARED

		1930	1933	1934	Percentage Change in sales 1933-1934
CANADA, TOTAL <sup>(1)</sup>	Chains	87	91	84	..1
	Stores(maximum)	2,352	2,398	2,381	
	Sales	\$127,582,500	103,382,900	104,614,500	+1.19
British Columbia	Chains	19	17	16	
	Stores(maximum)	244	282	292	
	Sales	\$ 10,117,100	8,606,800	9,065,400	+5.33
Alberta	Chains	8	11	10	
	Stores(maximum)	120	127	128	
	Sales	\$ 5,587,000	4,519,100	4,793,800	+6.08
Saskatchewan	Chains	10	8	6	
	Stores(maximum)	165	138	133	
	Sales	\$ 6,969,300	4,177,600	4,168,700	- .21
Manitoba	Chains	8	6	5	
	Stores	121	110	109	
	Sales	\$ 5,689,100	4,697,600	4,896,300	+4.23
Ontario	Chains	37	37	36	
	Stores	1,107	1,113	1,086	
	Sales	\$ 70,769,300	55,450,700	56,563,500	+2.01
Quebec	Chains	13	12	12	
	Stores	495	472	483	
	Sales	\$ 23,708,400	20,456,500	19,539,000	-4.49
Atlantic Provinces	Chains	12	17	15	
	Stores	98	156	148	
	Sales	\$ 4,664,500	5,474,600	5,517,300	+ .78

Includes Yukon and N.W.T.





GROCERY CHAINS IN CANADA

Table III. Number of Chains, Stores and Total Sales, by Years, 1930-1934

	1930	1931	1932	1933	1934
Number of Chains .....	43	44	44	46	39
Number of Stores -					
Maximum .....	748	774	801	821	792
Average .....	722	744	769	790	765
Total Sales .....	\$44,698,400	40,415,500	37,307,900	37,135,000	39,154,500
Index of chain sales (1930=100) .....	100.00	90.42	83.47	83.08	87.60
Percentage change in sales from preceding year .....	-	-9.58	-7.69	- .46	+5.44

COMBINATION STORE CHAINS IN CANADA

Table IV. Number of Chains, Stores and Total Sales, by Years, 1930-1934.

	1930	1931	1932	1933	1934
Number of Chains .....	23	25	27	29	33
Number of Stores -					
Maximum .....	1,379	1,419	1,431	1,400	1,433
Average .....	1,282	1,354	1,382	1,342	1,385
Total Sales .....	\$74,800,200	76,684,000	67,134,700	61,471,500	61,422,100
Index of chain sales (1930=100) .....	100.00	102.51	89.75	82.18	82.11
Percentage change in sales from preceding year .....	-	+2.51	-12.45	-8.44	- .08

MEAT MARKET CHAINS IN CANADA

Table V. Number of Chains, Stores and Total Sales, by Years, 1930-1934.

	1930	1931	1932	1933	1934
Number of Chains .....	21	21	19	16	12
Number of Stores -					
Maximum .....	225	217	204	177	156
Average .....	214	212	196	169	151
Total Sales .....	\$8,083,900	6,468,500	5,196,500	4,776,400	4,037,900
Index of chain sales (1930=100) .....	100.00	80.02	64.28	59.08	49.95
Percentage change in sales from preceding year .....	-	-19.98	-19.66	-8.08	-15.46





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## CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS.

Food Chains in Canada, 1935 (Preliminary)

There were 86 different food chain companies in Canada in 1935 and these operated 2,309 stores with \$105,624,100 sales. Comparative figures for 1934 show that there were also 86 food chains in that year and that these operated 2,395 stores with \$104,912,800 sales. Thus, while the number of chain companies did not vary, the smaller number of stores translated a slightly greater aggregate business, indicating the closing of some of the weaker units and increased business by the continuing branches.

Increases in food chain sales were not recorded for all provinces. Food chains did 4.8 per cent less business (based on dollar value) in the province of Quebec in 1935 than in the preceding year and 8 per cent less than in 1933. Sales in the Maritime Provinces, Ontario and Manitoba showed a slight variation between 1934 and 1935, while increases of almost 10 per cent were recorded in Saskatchewan, Alberta and in British Columbia.

Ontario accounts for 53 per cent of the total food chain business in the Dominion, the 37 chains in that province operating 1,075 stores with \$6,488,600 sales. Quebec comes next with 11 chains operating 425 stores and \$18,809,600 sales, followed by British Columbia with 17 chains, 297 stores and \$10,148,000 sales.

Chains are defined for the Census of Merchandising and Service Establishments as groups of four or more stores under the same ownership or management and carrying on the same or similar kinds of business. The food chains included in this report are grocery chains, combination store chains (those selling both groceries and meats) and meat market chains. Corporate chains only are included here. Figures for voluntary chains, in which the stores are individually owned and operated but are grouped for buying or advertising purposes, will be included in a later report.

Of the 86 food chains operating in 1935 and included in this report, 38 are classified as grocery chains, 35 as combination store chains and 13 as meat market chains. The 38 grocery chains operated 611 stores with \$23,870,900 sales. The 35 combination store chains operated a total of 1,540 stores and had \$77,535,700 sales. Many combination store chains operate a number of straight grocery units in addition to those of the combination store type in which both groceries and meats are sold. The 1,540 units of combination store chains operating in 1935 include 681 straight grocery stores with \$25,710,500 sales, 839 stores of the combination type with \$51,366,100 sales, and 20 other units (chiefly meat markets) with \$9,459,100 sales. Table 6 shows the number and value of sales of the different types of stores operated by combination store chains classified according to size. The smaller combination store chains are seen to consist most entirely of units of the combination type. On the other hand, units of the larger combination store chains are divided about evenly as between straight grocery and combination stores. The 13 meat market chains operated 13 stores with \$4,217,500 sales.

Due to the development of grocery units into those of the combination type, firms classified as grocery chains in one year may be classified as combination chains in another. This factor must be kept in mind in





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Increases in food chain sales were not recorded for all provinces. Food chains did 4.8 per cent less business (based on dollar value) in the province of Quebec in 1935 than in the preceding year and 8 per cent less than in 1933. Sales in the Maritime Provinces, Ontario and Manitoba showed a slight variation between 1934 and 1935, while increases of almost 10 per cent were recorded in Saskatchewan, Alberta and in British Columbia.

Ontario accounts for 53 per cent of the total food chain business of the Dominion, the 37 chains in that province operating 1,075 stores with \$6,468,600 sales. Quebec comes next with 11 chains operating 425 stores and \$18,809,600 sales, followed by British Columbia with 17 chains, 297 stores and \$10,148,000 sales.

Chains are defined for the Census of Merchandising and Service Establishments as groups of four or more stores under the same ownership or management and carrying on the same or similar kinds of business. The food chains included in this report are grocery chains, combination store chains (those selling both groceries and meats) and meat market chains. Corporate chains only are included here. Figures for voluntary chains, in which the stores are individually owned and operated but are grouped for buying or advertising purposes, will be included in a later report.

Of the 86 food chains operating in 1935 and included in this report, 38 are classified as grocery chains, 35 as combination store chains and 13 as meat market chains. The 38 grocery chains operated 611 stores with \$23,870,900 sales. The 35 combination store chains operated a total of 1,540 stores and had \$77,535,700 sales. Many combination store chains operate a number of straight grocery units in addition to those of the combination store type in which both groceries and meats are sold. The 1,540 units of combination store chains operating in 1935 include 681 straight grocery stores with \$25,710,500 sales, 839 stores of the combination type with \$51,366,100 sales, and 20 other units (chiefly meat markets) with \$9,100 sales. Table 6 shows the number and value of sales of the different types of stores operated by combination store chains classified according to size. The smaller combination store chains are seen to consist almost entirely of units of the combination type. On the other hand, units of the larger combination store chains are divided about evenly as between straight grocery and combination stores. The 13 meat market chains operated 8 stores with \$4,217,500 sales.

Due to the development of grocery units into those of the combination type, firms classified as grocery chains in one year may be classified as combination chains in another. This factor must be kept in mind in





Interpreting the business trends of the three types of chains shown in this report. A year-to-year comparison is only valid for all food chains as a whole as summarized in Table I.

It should also be emphasized that this report relates to the total business transacted by food chains as distinguished from the sales of food products made by all types of chains. Food products are sold in various other kinds of chains - variety-store chains, country general store chains, etc. - in addition to the chain companies classified as food chains and whose activities are summarized in this report.

Table I.--Number of Chains, Stores and Total Sales, by Years, 1930 - 1935  
(Grocery, Combination and Meat Market Chains Combined)

	1930	1932	1933	1934	1935
Number of Chains .....	87	90	91	86	86
Number of Stores:					
Maximum .....	2,352	2,436	2,398	2,395	2,309
Average(1) .....	2,218	2,347	2,301	2,310	2,241
Total Sales .....	\$127,582,500	\$102,813,200	\$103,638,500	\$104,912,800	\$105,624,100
Chain Sales Index (1930 = 100.0) .....	100.00	85.07	81.85	82.23	82.79
Percentage change in sales from preceding year .....	-	-16.92(2)	+0.80	+1.22	+0.68

(1) Computed from number at beginning, middle and end of each year.

(2) Per cent change from 1931.

Table II.--Number of Food Chains, Stores and Sales, by Provinces,  
1930, 1933, 1934 and 1935 Compared

	1930	1933	1934	1935	% change in sales, 1934-35
CANADA, Chains .....	87	91	86	86	
Total-- Stores(max.)	2,352	2,398	2,395	2,309	
Sales .....	\$127,582,500	\$103,638,500	\$104,912,800	\$105,624,100	+0.68
British Chains .....	19	17	18	17	
Columbia Stores(max.)	246	282	307	297	
(1) -- Sales .....	\$ 10,194,900	\$ 8,862,400	\$ 9,235,800	\$ 10,148,000	+9.87
Alberta-- Chains .....	8	11	10	11	
Stores(max.)	120	127	128	129	
Sales .....	\$ 5,587,000	\$ 4,519,100	\$ 4,777,300	\$ 5,234,000	+9.56
Manitoba-- Chains .....	10	8	6	6	
Saskatchewan-- Stores(max.)	165	138	133	132	
Sales .....	\$ 6,969,300	\$ 4,177,600	\$ 4,168,600	\$ 4,575,400	+9.76
Manitoba-- Chains .....	8	6	5	5	
Stores(max.)	121	110	109	106	
Sales .....	\$ 5,689,100	\$ 4,697,600	\$ 4,895,200	\$ 4,813,800	-1.66
Ontario-- Chains .....	37	37	36	37	
Stores(max.)	1,107	1,113	1,086	1,075	
Sales .....	\$ 70,769,300	\$ 55,450,700	\$ 56,563,500	\$ 56,488,600	-0.13
Quebec-- Chains .....	13	12	12	11	
Stores(max.)	495	472	483	425	
Sales .....	\$ 23,708,400	\$ 20,456,500	\$ 19,759,700	\$ 18,809,600	-4.81
Maritime Chains .....	12	17	15	15	
Provinc-- Stores(max.)	98	156	149	145	
ces-- Sales .....	\$ 4,664,500	\$ 5,474,600	\$ 5,512,700	\$ 5,554,700	+0.76

(1) Includes Yukon and Northwest Territories.





Table III.--Number of Grocery Chains, Stores and Total Sales, by Years, 1930 - 1935

	1930	1932	1933	1934	1935
Number of Chains .....	43	44	46	40	38
Number of Stores:					
Maximum .....	748	801	821	746	611
Average .....	722	769	790	719	592
Total Sales .....	\$44,698,400	\$37,484,000	\$37,390,600	\$37,390,600	\$23,870,900

Table IV.--Number of Combination Store Chains, Stores and Total Sales, by Years,  
1930 - 1935

	1930	1932	1933	1934	1935
Number of Chains .....	23	27	29	34	35
Number of Stores:					
Maximum .....	1,379	1,431	1,400	1,493	1,540
Average .....	1,282	1,382	1,342	1,440	1,498
Total Sales .....	\$74,800,200	\$67,134,700	\$61,471,500	\$63,484,300	\$77,535,700

Table V.--Number of Meat Market Chains, Stores and Total Sales, by Years,  
1930 - 1935

	1930	1932	1933	1934	1935
Number of Chains .....	21	19	16	12	13
Number of Stores:					
Maximum .....	225	204	177	156	158
Average .....	214	196	169	151	151
Total Sales .....	\$8,083,900	\$5,196,500	\$4,776,400	\$4,037,900	\$4,217,500

Table VI.--Kinds of Stores Operated by Combination Store Chains in 1935

Size of Chain	Number of Chains	Total Units <sup>(1)</sup>		Grocery Units		Combination Units	
		Number	Sales	Number	Sales	Number	Sales
1 Combination Store Chains, Total .....	35	1,540	\$77,535,700	681	\$25,710,500	839	\$51,366,100
Chains having --							
Less than 10 units .	23	134	\$ 5,889,200	9	\$ 181,700	116	\$ 5,472,400
10 to 99 units .....	7	199	\$ 8,063,900	70	\$ 2,313,900	119	\$ 5,551,000
100 units and over .	5	1,207	\$63,582,600	502	\$23,214,900	604	\$40,342,700

) These figures include a few stores other than grocery and combination stores.





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## CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS.

Food Chains in Canada, 1936 (Preliminary)

A moderate improvement in the business transacted by food chains in Canada last year is reflected in preliminary compilations for the annual Census of Merchandising Establishments. These show that sales for 1936 of 90 chain companies specializing in the retail distribution of groceries and meats exceeded by 6 per cent the amount recorded for 86 similar organizations in 1935. The 90 chain companies in Canada last year operated 341 stores with \$111,560,900 sales while the 86 companies in 1935 had 309 stores and \$105,635,900 sales.

Differences in amount of chain store business from year to year are due not only to variations in the amount of business that each store transacts but also to changes both in the number of chain companies in operation and in the number of unit stores that these chains possess. Sales per store averaged \$49,938 last year or about 6 per cent higher than in 1935 although still 13 per cent below the 1930 average.

Excepting only in Manitoba where a slight recession of 1 per cent was recorded, increases in food chain sales last year were reported in all provinces. Saskatchewan showed the best improvement with a gain of 10 per cent. Ontario, Alberta and British Columbia each reported increases ranging between 6 and 7 per cent. Quebec sales were up 4 per cent and Prince Edward Island, 2.5 per cent.

The 90 food chain companies last year included 35 grocery chains with 530 stores and \$19,009,200 sales. The 530 stores were all of the straight grocery type. There were 14 meat market chains with 162 stores and \$4,166,000 sales. These were engaged almost exclusively in the distribution of meat products although some canned goods were generally sold. Occupying first place in the food chain field were 41 combination store chains with 1,649 stores and \$88,385,700 sales. Not all these stores were of the combination type where both groceries and meats are sold. The 1,649 stores included 715 straight grocery units with \$26,035,600 sales and 917 units of the combination type with \$619,060,000 sales. There were also 17 stores belonging to miscellaneous types which could not be classified as either grocery or combination stores and these had \$444,100 sales.

The smaller combination store chains are comprised almost entirely of stores of the combination type. The 170 units of 30 small chains each with fewer than 10 stores were divided in the proportion of 25 grocery units, 137 combination units and 8 units of miscellaneous types. The five largest chains (each with 100 stores or more) had a total of 1,351 stores, of which 631 were grocery, 720 were combination and 9 were of miscellaneous types of business.





Table I.--Number of Chains, Stores and Total Sales, by Years, 1930 and 1933 to 1936  
(Grocery, Combination and Meat Market Chains Combined)

	1930	1933	1934	1935	1936
Number of Chains .....	87	91	86	86	90
Number of Stores:					
Maximum .....	2,352	2,398	2,395	2,309	2,341
Average(1) .....	2,218	2,301	2,310	2,241	2,234
Total Sales .....	\$127,582,500	\$103,638,500	\$104,912,800	\$105,635,900	\$111,560,900
Chain Sales Index (1930 = 100.0) .....	100.0	81.2	82.2	82.8	87.4
Percentage change in sales from preceding year .....	-	+0.8	+1.2	+0.7	+5.6

(1) Computed from number at beginning, middle and end of each year.

Table II.--Number of Food Chains, Stores and Sales, by Provinces,  
1930, 1934, 1935 and 1936 Compared

		1930	1934	1935	1936	% Change in Sales 1935-36
CANADA, Total-	Chains .....	87	86	86	90	
	Stores(max.) .....	2,352	2,395	2,309	2,341	
	Sales .....	\$127,582,500	\$104,912,800	\$105,635,900	\$111,560,900	+5.6
British Columbia(1)-	Chains .....	19	18	17	16	
	Stores(max.) .....	246	307	297	300	
	Sales .....	\$ 10,194,900	\$ 9,235,800	\$ 10,148,000	\$ 10,808,000	+6.5
Alberta-	Chains .....	8	10	11	10	
	Stores(max.) .....	120	128	130	131	
	Sales .....	\$ 5,587,000	\$ 4,777,300	\$ 5,250,900	\$ 5,589,900	+6.5
Saskatchewan-	Chains .....	10	6	6	6	
	Stores(max.) .....	165	133	131	130	
	Sales .....	\$ 6,969,300	\$ 4,168,600	\$ 4,558,500	\$ 5,004,100	+9.8
Manitoba-	Chains .....	8	5	5	4	
	Stores(max.) .....	121	109	106	103	
	Sales .....	\$ 5,689,100	\$ 4,895,200	\$ 4,813,800	\$ 4,765,100	-1.0
Ontario-	Chains .....	37	36	37	42	
	Stores(max.) .....	1,107	1,086	1,075	1,097	
	Sales .....	\$ 70,769,300	\$ 56,563,500	\$ 56,515,600	\$ 60,133,200	+6.4
Quebec-	Chains .....	13	12	11	10	
	Stores(max.) .....	495	483	425	428	
	Sales .....	\$ 23,708,400	\$ 19,759,700	\$ 18,809,400	\$ 19,579,800	+4.1
Maritime Provinces-	Chains .....	12	15	15	16	
	Stores(max.) .....	98	149	145	152	
	Sales .....	\$ 4,664,500	\$ 5,512,700	\$ 5,539,700	\$ 5,680,800	+2.5

(1) Includes Yukon and Northwest Territories.





Table III.--Number of Grocery Chains, Stores and Total Sales, by Years.

1930 and 1933 to 1936

	1930	1933	1934	1935	1936
Number of Chains .....	43	46	40	38	35
Number of Stores:					
Maximum .....	748	821	746	611	530
Average .....	722	790	719	592	504
Total Sales .....	\$44,698,400	\$37,390,600	\$37,390,600	\$23,870,900	\$19,009,200

Table IV.--Number of Combination Store Chains, Stores and Total Sales, by Years.

1930 and 1933 to 1936

	1930	1933	1934	1935	1936
Number of Chains .....	23	29	34	35	41
Number of Stores:					
Maximum .....	1,379	1,400	1,493	1,540	1,649
Average .....	1,282	1,342	1,440	1,498	1,580
Total Sales .....	\$74,800,200	\$61,471,500	\$63,484,300	\$77,547,500	\$88,385,700

Table V.--Number of Meat Market Chains, Stores and Total Sales, by Years.

1930 and 1933 to 1936

	1930	1933	1934	1935	1936
Number of Chains .....	21	16	12	13	14
Number of Stores:					
Maximum .....	225	177	156	158	162
Average .....	214	169	151	151	150
Total Sales .....	\$ 8,083,900	\$ 6,776,400	\$ 4,037,900	\$ 4,217,500	\$ 4,166,000

Table VI.--Kinds of Stores Operated by Combination Store Chains in 1936

Size of Chain	Number of Chains	Total Units(1)		Grocery Units		Combination Units	
		Number	Sales	Number	Sales	Number	Sales
Combination Store Chains, Total .....	41	1,649	\$88,385,700	715	\$26,035,600	917	\$61,906,000
Chains having -							
Less than 10 units ...	30	170	\$8,578,200	25	\$40,000	137	\$7,778,200
10 to 99 units .....	6	128	\$4,323,900	59	\$11,460,800	60	\$2,679,000
100 units and over ...	5	1,351	\$75,483,600	631	\$24,034,800	720	\$51,448,800

These figures include a few stores other than grocery and combination stores.



DEPARTMENT OF TRADE AND COMMERCE  
DOMINION BUREAU OF STATISTICS  
INTERNAL TRADE BRANCH  
OTTAWA, CANADA

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Statistician: A. C. Steedman, B. A.

CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS

Food Chains in Canada, 1937 (Preliminary)

Sales of food chains in Canada gained 8.5 per cent in 1937 over 1936 according to results of the annual Census of Merchandising for which returns were secured from 89 chain companies with 2,289 stores and \$121,029,100 sales. Preliminary compilations for all retail trade reveals a similar percentage increase in sales for all food stores including both chains and independents indicating that the position occupied by chains in the food retailing field remained practically unchanged in 1937 from the preceding year. Sales of food chains in 1937 were only 5.1 per cent lower than in 1930, the earliest year for which data are available.

Increased chain sales in 1937 over 1936 must be attributed to a substantial gain of almost 11 per cent in average turnover per chain unit rather than to any expansion in the number of units in operation. In fact there were 45 fewer chain units in the food retailing field in 1937 than in 1936 when 89 chain companies operated 2,334 stores and had \$111,511,900 sales. In 1930 there were 87 chain companies with 2,352 stores and \$127,582,500 sales.

The decrease in number of chain units in 1937 was confined almost entirely to Quebec and the Maritime Provinces, the number of units in other regions of the country remaining practically unchanged from the preceding year. There were 29 fewer chain units in Quebec in 1937 than in 1936 notwithstanding which a gain of 2.2 per cent in food chain sales took place. In 1936 there were 10 food chain companies with 428 units in this province and these had \$19,595,300 sales. In the following year there were 9 chain companies with 399 units and \$23,032,400 sales. A decrease of 14 in the number of units operated in the Maritime Provinces was associated with a gain of 7.5 per cent in value of chain sales. All other provinces reported increased sales in 1937 over 1936, the increases for the various divisions being as follows: Saskatchewan 7.7 per cent; Ontario, 9.9 per cent; Manitoba, 10.3 per cent; Alberta, 11.0 per cent; and British Columbia, 12.3 per cent.

This report covers the operations of all companies operating four or more retail units and engaged primarily in the distribution of grocery or meat products. Candy and restaurant chains are not included. The report covers grocery chains, combination chains (those selling both groceries and fresh meats) and meat market chains.

There were 31 grocery chains in Canada in 1937 with 499 stores and \$20,149,700 sales, a gain of 6.5 per cent over the business transacted in 1936 by 34 chains with 524 stores. There were 44 combination store chains in 1937 with 1,628 stores and \$96,214,300 sales, up 8.8 per cent from the \$88,423,000 turnover secured by 41 chains with 1,648 stores in 1936. Meat market chains numbering 14 operated 162 stores with \$4,665,100 sales in 1937, up 12.0 per cent in value of sales from the preceding year when a like number of chain companies operated a like number of unit stores.

Not all units of the combination store chains sell both groceries and meats although the proportion which do so continues to increase from year to year. Of the 1,628 units of combination store chains in 1937, 969 or 59.5 per cent were of the combination type in which both groceries and fresh meats were sold. In 1936 the proportion was 55.6 per cent while in 1930 the units of combination chains were equally divided as between the combination and grocery type. The scale of operations for combination units is greater than that of stores of the purely grocery type as is evident from the fact that the 969 units of the combination type operating in 1937, while forming 59.5 per cent of the total number of stores operated by combination store chains, transacted 75.4 per cent of the total annual sales of these same companies.





Table I. - Number of Chains, Stores and Total Sales, by Years, 1930 and 1934 to 1937  
(Grocery, Combination and Meat Market Chains Combined)

	1930	1934	1935	1936	1937
Number of Chains	87	86	86	89	89
Number of Stores:					
Maximum .....	2,352	2,395	2,309	2,334	2,289
Average(1) .....	2,218	2,310	2,241	2,229	2,182
Total Sales .....	\$127,582,500	\$104,912,800	\$105,635,900	\$111,511,900	\$121,029,100
Main Sales Index (1930 = 100.0) .....	100.0	82.2	82.8	87.4	94.9
Percentage change in sales from preceding year .....	-	+ 1.2	+ 0.7	+ 5.6	+ 8.5

(1) Computed from number at beginning, middle and end of each year.

Table II. - Number of Food Chains, Stores and Sales, by Provinces,  
1930, 1935, 1936 and 1937 Compared

	1930	1935	1936	1937	% Change in Sales 1936-37
NADA, Total - Chains .....	87	86	89	89	
Stores(max.) .....	2,352	2,309	2,334	2,289	
Sales .....	\$127,582,500	\$105,635,900	\$111,511,900	\$121,029,100	+ 8.5
British Columbia(1)- Chains .....	19	17	16	15	
Stores(max.) .....	246	297	300	294	
Sales .....	\$ 10,194,900	\$ 10,148,000	\$ 10,803,200	\$ 12,010,900	+12.3
Alberta- Chains .....	8	11	10	9	
Stores (max.) .....	120	130	131	128	
Sales .....	\$ 5,587,000	\$ 5,250,900	\$ 5,585,200	\$ 6,200,700	+11.0
Saskatchewan- Chains .....	10	6	5	5	
Stores(max.) .....	165	131	125	127	
Sales .....	\$ 6,969,300	\$ 4,558,500	\$ 4,767,300	\$ 5,135,900	+ 7.7
Manitoba- Chains .....	8	5	4	5	
Stores(max.) .....	121	106	104	111	
Sales .....	\$ 5,689,100	\$ 4,813,800	\$ 4,908,600	\$ 5,414,300	+10.3
Ontario- Chains .....	37	37	42	45	
Stores(max.) .....	1,107	1,075	1,095	1,093	
Sales .....	\$ 70,769,300	\$ 56,515,600	\$ 60,149,700	\$ 66,105,400	+ 9.9
Quebec- Chains .....	13	11	10	9	
Stores(max.) .....	495	425	428	399	
Sales .....	\$ 23,708,400	\$ 18,809,400	\$ 19,595,300	\$ 20,032,400	+ 2.2
Maritime Provinces- Chains .....	12	15	16	16	
Stores(max.) .....	98	145	151	137	
Sales .....	\$ 4,664,500	\$ 5,539,700	\$ 5,702,600	\$ 6,129,500	+ 7.5

(1) Includes Yukon and Northwest Territories.





Table III. - Number of Grocery Chains, Stores and Total Sales, by Years  
1930 and 1934 to 1937

	1930	1934	1935	1936	1937
Number of Chains .....	43	40	38	34	31
Number of Stores:					
Maximum .....	748	746	611	524	499
Average .....	722	719	592	500	484
Total Sales .....	\$44,698,400	\$37,390,600	\$23,870,900	\$18,922,900	\$20,149,700

Table IV. - Number of Combination Store Chains, Stores and Total Sales, by Years,  
1930 and 1934 to 1937

	1930	1934	1935	1936	1937
Number of Chains .....	23	34	35	41	44
Number of Stores:					
Maximum .....	1,379	1,493	1,540	1,648	1,628
Average .....	1,282	1,440	1,498	1,579	1,543
Total Sales .....	\$74,800,200	\$63,484,300	\$77,547,500	\$88,423,000	\$96,214,300

Table V. - Number of Meat Market Chains, Stores and Total Sales, by Years,  
1930 and 1934 to 1937

	1930	1934	1935	1936	1937
Number of Chains .....	21	12	13	14	14
Number of Stores:					
Maximum .....	225	156	158	162	162
Average .....	214	151	151	150	155
Total Sales .....	\$ 8,083,900	\$ 4,037,900	\$ 4,217,500	\$ 4,166,000	\$ 4,665,100

Table VI. - Kinds of Stores Operated by Combination Store Chains in 1937

Size of Chain	Number of Chains	Total Units(1)		Grocery Units		Combination Units	
		Number	Sales	Number	Sales	Number	Sales
			\$		\$		\$
All Combination Store Chains, Total .....	44	1,628	96,214,300	643	23,323,800	969	72,521,900
Chains having -							
Less than 10 units.	33	190	11,600,800	36	1,597,500	150	9,912,500
10 to 99 units ....	6	123	4,265,300	38	1,122,800	75	2,959,000
100 units and over	5	1,315	80,348,200	569	20,603,500	744	59,650,400

(1) These figures include a few stores other than grocery and combination stores.

Date		Description		Amount	
1998	12/31	Balance		100,000.00	
1999	01/01	Transfer		100,000.00	
1999	03/01	Transfer		100,000.00	
1999	06/01	Transfer		100,000.00	
1999	09/01	Transfer		100,000.00	
1999	12/31	Balance		400,000.00	
2000	01/01	Transfer		400,000.00	
2000	03/01	Transfer		400,000.00	
2000	06/01	Transfer		400,000.00	
2000	09/01	Transfer		400,000.00	
2000	12/31	Balance		1,600,000.00	
2001	01/01	Transfer		1,600,000.00	
2001	03/01	Transfer		1,600,000.00	
2001	06/01	Transfer		1,600,000.00	
2001	09/01	Transfer		1,600,000.00	
2001	12/31	Balance		6,400,000.00	
2002	01/01	Transfer		6,400,000.00	
2002	03/01	Transfer		6,400,000.00	
2002	06/01	Transfer		6,400,000.00	
2002	09/01	Transfer		6,400,000.00	
2002	12/31	Balance		25,600,000.00	
2003	01/01	Transfer		25,600,000.00	
2003	03/01	Transfer		25,600,000.00	
2003	06/01	Transfer		25,600,000.00	
2003	09/01	Transfer		25,600,000.00	
2003	12/31	Balance		102,400,000.00	

Date		Description		Amount	
2004	01/01	Transfer		102,400,000.00	
2004	03/01	Transfer		102,400,000.00	
2004	06/01	Transfer		102,400,000.00	
2004	09/01	Transfer		102,400,000.00	
2004	12/31	Balance		409,600,000.00	
2005	01/01	Transfer		409,600,000.00	
2005	03/01	Transfer		409,600,000.00	
2005	06/01	Transfer		409,600,000.00	
2005	09/01	Transfer		409,600,000.00	
2005	12/31	Balance		1,638,400,000.00	
2006	01/01	Transfer		1,638,400,000.00	
2006	03/01	Transfer		1,638,400,000.00	
2006	06/01	Transfer		1,638,400,000.00	
2006	09/01	Transfer		1,638,400,000.00	
2006	12/31	Balance		6,553,600,000.00	
2007	01/01	Transfer		6,553,600,000.00	
2007	03/01	Transfer		6,553,600,000.00	
2007	06/01	Transfer		6,553,600,000.00	
2007	09/01	Transfer		6,553,600,000.00	
2007	12/31	Balance		26,214,400,000.00	

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OTTAWA, CANADA

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Chief, Internal Trade Branch:  
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CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS

Food Chains in Canada, 1938 (Preliminary)

Notwithstanding a decline in the number of units operated by food chains in Canada last year, dollar volume of sales was maintained at the 1937 level. There were 89 food chain companies in Canada in 1938 with a total of 2,201 unit stores in operation during all or part of the year and these had \$121,166,700 sales. In the preceding year there were also 89 chain companies with 2,287 stores and \$121,054,800 sales. The number of stores in operation was reduced considerably during the year under review. At the beginning of 1938 there were 2,132 unit stores in operation. The number was reduced to 2,072 by midsummer and there was a further reduction to 2,024 by the end of the year.

Results on a regional basis show that food chain sales for 1938 compared with 1937 were up 3 per cent in Ontario, 2 per cent in Alberta and 1 per cent in Saskatchewan. Other regions reported decreased business. Sales in Quebec were down by 4 per cent; British Columbia sales were off by 5 per cent while in Manitoba there was a reduction of 8 per cent.

All regions excepting Saskatchewan reported fewer stores in operation in 1938 than in the preceding year. Numbers of stores operated in 1938 in the several regions for which figures are compiled with corresponding numbers for 1937 in brackets are as follows: British Columbia, 283 (292); Alberta, 124 (128); Saskatchewan, 130 (137); Manitoba, 109 (111); Ontario, 1,071 (1,101); Quebec, 352 (389) and Maritime Provinces, 132 (137).

The 89 food chains operating last year included 29 grocery chains with 1,570 stores and \$19,431,600 sales. There were also 46 combination store chains with 1,570 stores and \$97,213,400 sales. Not all the units of combination store chains sell both groceries and meats although most of the business is transacted in stores of the combination type. The 1,570 units of combination chains included 629 units which were solely grocery stores and these had annual sales of \$21,955,400. The 1,570 units also included 923 combination stores with \$74,679,800 sales and 8 units assigned to other end-of-business classifications with \$578,200 sales. There were 14 meat market chains with 158 stores and \$4,521,700 sales.





Table 1. - Number of Chains, Stores and Total Sales, by Years, 1930 and 1935 to 1938  
(Grocery, Combination and Meat Market Chains Combined)

	1930	1935	1936	1937	1938
Number of chains	87	86	89	89	89
Number of Stores:					
Maximum .....	2,352	2,309	2,334	2,287	2,201
Average(1) .....	2,218	2,241	2,229	2,179	2,083
Total Sales .....	\$127,582,500	\$105,635,900	\$111,511,900	\$121,054,800	\$121,166,700
Chain Sales Index (1930 = 100.0) .....	100.0	82.8	87.4	94.9	95.0
Percentage change in sales from preceding year .....	-	+ 0.7	+ 5.6	+ 8.6	+ 0.1

(1) Computed from number at beginning, middle and end of each year.

Table 11. - Number of Food Chains, Stores and Sales, by Provinces  
1930, 1936, 1937 and 1938 Compared

	1930	1936	1937	1938	%Change in Sales 1937/38
CANADA, Total - Chains .....	87	89	89	89	
Stores(max.) .....	2,352	2,334	2,287	2,201	
Sales .....	\$127,582,500	\$111,511,900	\$121,054,800	\$121,166,700	+ 0.1
British Columbia(1) - Chains .....	19	16	15	14	
-Stores(max.) .....	246	300	292	283	
Sales .....	\$ 10,194,900	\$ 10,803,200	\$ 11,888,200	\$ 11,326,000	- 4.7
Alberta - Chains .....	8	10	9	8	
Stores(max.) .....	120	131	128	124	
Sales .....	\$ 5,587,000	\$ 5,585,200	\$ 6,200,700	\$ 6,296,500	+ 1.5
Saskatchewan - Chains .....	10	5	5	6	
Stores(max.) .....	165	125	127	130	
Sales .....	\$ 6,969,300	\$ 4,767,300	\$ 5,135,900	\$ 5,193,700	+ 1.1
Manitoba - Chains .....	8	4	5	5	
Stores(max.) .....	121	104	111	109	
Sales .....	\$ 5,689,100	\$ 4,908,600	\$ 5,414,300	\$ 4,974,500	- 8.1
Ontario - Chains .....	37	42	45	47	
Stores(max.) .....	1,107	1,095	1,101	1,071	
Sales .....	\$ 70,769,300	\$ 60,149,700	\$ 66,561,000	\$ 68,435,300	+ 2.8
Quebec - Chains .....	13	10	9	8	
Stores(max.) .....	495	428	389	352	
Sales .....	\$ 23,708,400	\$ 19,595,300	\$ 19,602,500	\$ 18,875,800	- 3.7
Maritime Provinces - Chains .....	12	16	16	15	
Stores(max.) .....	98	151	137	132	
Sales .....	\$ 4,664,500	\$ 5,702,600	\$ 6,129,500	\$ 6,064,900	- 1.1

(1) Includes Yukon and Northwest Territories.





Table III. - Number of Grocery Chains, Stores and Total Sales, by Years,  
1930 and 1935 to 1938

	1930	1935	1936	1937	1938
Number of Chains .....	43	38	34	31	29
Number of Stores:					
Maximum .....	748	611	524	498	473
Average .....	722	592	500	482	450
Total Sales .....	\$44,698,400	\$23,870,900	\$18,922,900	\$20,167,700	\$19,431,600

Table IV. - Number of Combination Store Chains, Stores and Total Sales, by Years,  
1930 and 1935 to 1938

	1930	1935	1936	1937	1938
Number of Chains .....	23	35	41	44	46
Number of Stores:					
Maximum .....	1,379	1,540	1,648	1,627	1,570
Average .....	1,282	1,498	1,579	1,542	1,478
Total Sales .....	\$74,800,200	\$77,547,500	\$88,423,000	\$96,222,000	\$97,213,400

Table V. - Number of Meat Market Chains, Stores and Total Sales, by Years,  
1930 and 1935 to 1938

	1930	1935	1936	1937	1938
Number of Chains .....	21	13	14	14	14
Number of Stores:					
Maximum .....	225	158	162	162	158
Average .....	214	151	150	155	155
Total Sales .....	\$ 8,083,900	\$ 4,217,500	\$ 4,166,000	\$ 4,665,100	\$ 4,521,700

Table VI. - Kinds of Stores Operated by Combination Store Chains in 1938

Size of Chain	Number of Chains	Total Units(1)		Grocery Units		Combination Units	
		Number	Sales	Number	Sales	Number	Sales
1 Combination Store Chains, Total .....	46	1,570	97,213,400	629	21,955,400	923	74,679,800
Chains having -							
Less than 10 units .	34	194	12,687,200	41	1,951,200	146	10,594,800
10 to 99 units .....	7	136	5,196,300	51	1,289,500	75	3,563,800
100 units and over .	5	1,240	79,329,900	537	18,714,700	702	60,521,200

(1) These figures include a few stores other than grocery and combination stores.







